



PERS-INVESTMENT MANAGER

Characteristics of Work

This is highly technical work in the management of portfolios of the Public Employees' Retirement System, the Mississippi Highway Safety Patrol Retirement System, and the Government Employees' Deferred Compensation Plan. The work involves researching, analyzing and evaluating the investment merits of different types of investment projects and programs, monitoring stock and bond markets, and assisting in the formulation of investment recommendations to be presented to the Board of Trustees and in implementing approved portfolio strategy. General supervision is received from the Deputy Director for Investments.

Examples of Work

Examples of work performed in this classification include, but are not limited to, the following:

Performs in-depth credit research on various individual companies or industries using published financial statements.

Discusses and exchanges ideas with other security analysts associated with brokers, investment advisors, or fund evaluation services.

Maintains economic, business, and investment analysis information and background files to substantiate decisions.

Monitors price trends in the stock and bond markets daily.

Advises the Deputy Director for Investments on all matters pertaining to stock investments.
Assists the Deputy Director for Investments on the formulation of investment recommendations to be made to the Board of Trustees.

Assists the Deputy Director for Investments in the implementation of portfolio strategy as approved by the Board of Trustees.

Maintains proper computerized and hard copy records, reports, and files on investments and securities lending transactions.

Performs related or similar duties as required or assigned.

Essential Functions

Additional essential functions may be identified and included by the hiring agency. The essential functions include, but are not limited to, the following:

1. Researches, analyzes, and evaluates the investment merits on projects and programs.
2. Assists in the formulation of investment recommendations.

3. Monitors stock and bond markets.

Minimum Qualifications

These minimum qualifications have been agreed upon by Subject Matter Experts (SMEs) in this job class and are based upon a job analysis and the essential functions. However, if a candidate believes he/she is qualified for the job although he/she does not have the minimum qualifications set forth below, he/she may request special consideration through substitution of related education and experience, demonstrating the ability to perform the essential functions of the position. Any request to substitute related education or experience for minimum qualifications must be addressed to the State Personnel Board in writing, identifying the related education and experience which demonstrates the candidate's ability to perform all essential functions of the position.

Physical Requirements: These physical requirements are not exhaustive, and additional job related physical requirements may be added to these by individual agencies on an as needed basis. Corrective devices may be used to meet physical requirements. These are typical requirements; however, reasonable accommodations may be possible.

Light Work: May frequently walk or stand and/or frequently exert force equivalent to lifting up to approximately 10 pounds and/or occasionally exert force equivalent to lifting up to approximately 20 pounds.

Vision: Requires the ability to perceive the nature of objects by the eye.

Near Acuity: Clarity of vision at 20 inches or less.

Midrange: Clarity of vision at distances of more than 20 inches and less than 20 feet.

Far Acuity: Clarity of vision at 20 feet or more.

Depth Perception: Three-dimensional vision. Ability to judge distance and space relationships so as to see objects where and as they actually are.

Accommodation: Ability to adjust focus.

Speaking/Hearing: Ability to give and receive information through speaking and listening skills.

Motor Coordination:

While performing the duties of this job, the incumbent is regularly required to sit; use hands to finger, handle or feel objects, tools or controls, reach with hands and arms, and stoop, kneel, crouch, or bend. The incumbent is frequently required to stand; and walk. The incumbent is occasionally required to climb or balance.

Experience/Educational Requirements:

Education:

A Master's Degree from an accredited four-year college or university in business administration, in accounting, economics, or finance;

AND

Experience:

Two (2) years of experience directly related to the above-described duties;

OR

Education:

A Bachelor's Degree from an accredited four-year college or university in business administration, in accounting, economics, or finance;

AND

Experience:

Three (3) years of experience directly related to the above-described duties.

Substitution Statement:

Certification as a Chartered Financial Analyst designation as awarded by the Institution of Chartered Financial Analysts may be substituted on an equal basis for three (3) years of the required experience.

Required Document:

Applicant must attach a valid copy of his/her certificate as a Chartered Financial Analyst from the Institution of Chartered Financial Analysts.

Interview Requirements

Any candidate who is called to an agency for an interview must notify the interviewing agency in writing of any reasonable accommodation needed prior to the date of the interview.